



Department of the Treasury
Internal Revenue Service

The Business Case for *e-file*, a Panel Discussion with Tax Professionals

The Business Case for *e-file*

Administrative Details

- Session will be recorded and available at IRS.gov
- Certificates for CPE will be available
- Questions can be emailed through link under “Questions About the Presentation”
- For technical difficulties, call (800) 717-2821

The Business Case for *e-file* – *North Carolina*

Introduction of Panelists

- Lisa Buff, CPA
- Dorothy Leamon, Tax Pro
- Rose Speece, EA

The Business Case for *e-file* – North Carolina

Facts about *e-file*

- Program launched in 1986
- Congressional goal of 80% returns filed electronically
- 94 million returns filed electronically in 2009
- 60 million - 65% - filed by tax professionals

The Business Case for *e-file* – North Carolina

About our panelists

- Lisa Buff

- Partner with Smith, Miller and Buff in Morganton, NC.
- 20 years of accounting and taxation experience.
- Part-time instructor of accounting and taxation.

- Dorothy Leamon

- Owner of Dorothy's Tax Service in Clemmons, NC.
- Nearly 25 years tax experience.
- Former Board President of National Society of Tax Professionals.

- Rose Speece

- Founder and manager of North Iredell Records, Inc. in Union Grove, NC.
- Nearly 40 years tax experience.
- Vice President of the North Carolina Society of Tax Professionals.

The Business Case for *e-file* – North Carolina

Questions for panelists

- What compelled you to go with *e-file*?
- How did you make the switch to *e-file*?
- What has using *e-file* done for your business?
- How did you handled objections, within your company or from your clients, when you switched to e-file?
- What objections have you heard from other professionals, and how would you respond to those objections?

Questions from Participants

Click on link under “Questions About the Presentation”

The Business Case for *e-file*

Reminders

- Session will be available at IRS.gov
- Certificates for CPE will be emailed for live event
- Survey will be sent for your feedback
- For additional resources, visit www.irs.gov/taxpros
- Thanks to panelists and to all participants

The Business Case for *e-file*

Summary about *e-file*

- Easy to use
- Majority of tax professionals use it
- Saves time
- Saves money
- Safe and secure
- More and more clients request it



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